DTS ITSM Service Request Management System External Customer Overview

DTS ITSM Service Request Management System Introduction

- Overview of how Service Request Management (SRM) works
- High-level descriptions & specific design definitions
- Generic descriptions of how users access and use Service Request Management (SRM)
- Quick demonstration of the SRM Console
  - Logging in
  - Submitting a request
  - Viewing a request
  - Updating a request
  - Logging Off
- The implementation of the DTS ITSM Service Request Management System is Not designed to replace the Customer Support System (CSS) or the DTS Service Catalog.
- It is designed to replace the existing Remedy 5 web interface, Rapid Change application, and the former SubmitCR process.

What is SRM?

- Service Request Management (SRM) is the single point of entry in Remedy for users to open, view and manage their requests.

- SRM is an Actionable Service Catalog
  - Allows requester to see all services available
  - Allows self-service by requester
  - Provides feedback/tracking of requests

- Easy interaction between the Requester and Service Providers:
  - Web interface
  - Favorites
  - Search capable

- It allows uses to perform the following actions:
  - Look at services
  - Place orders
  - View orders
  - Reorder services
  - Create Requests
  - Search for Requests
  - View status on Requests
  - Modify or update Requests
  - Monitor recurring Requests
  - The ability to Close and Re-Open requests
  - Open Requests On Behalf Of Others
  - Run Reports

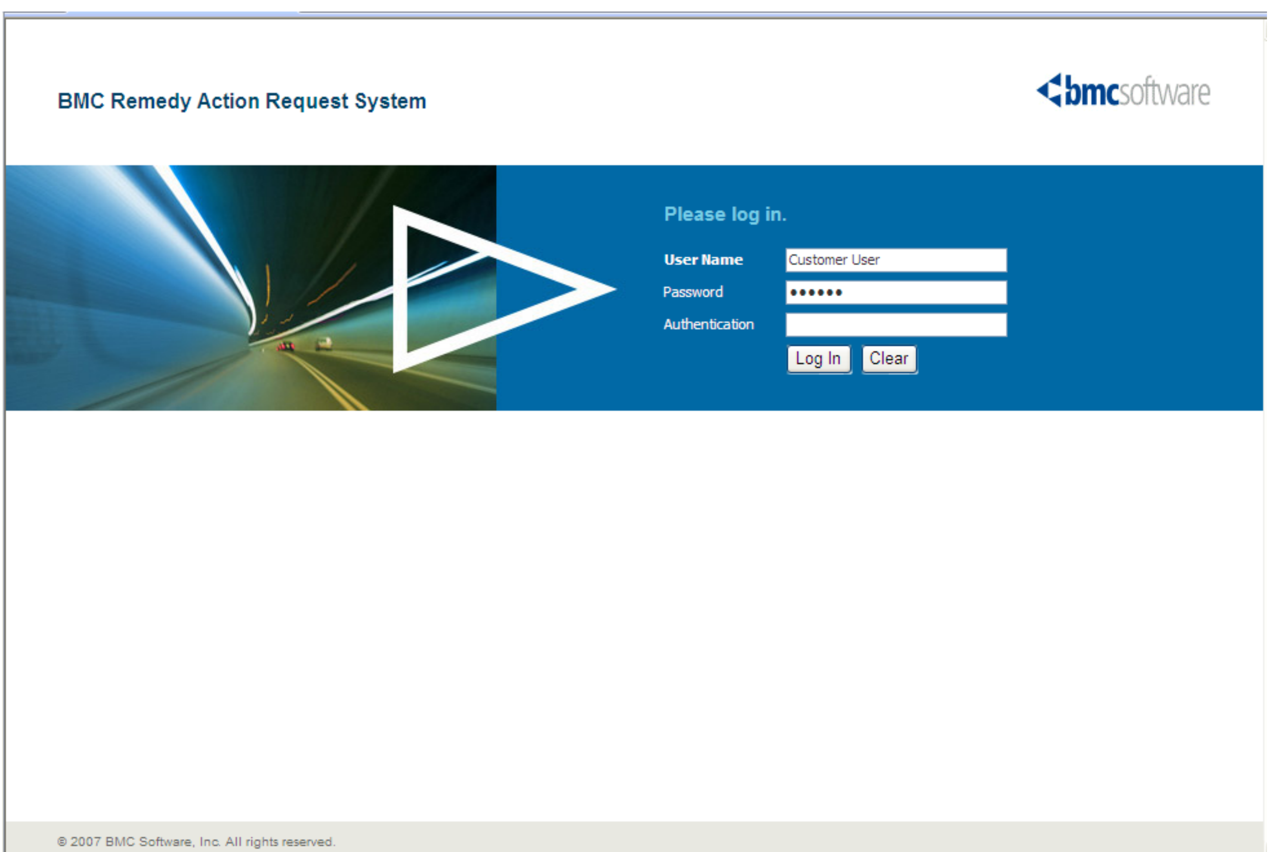
Logging In

- To obtain authorization to use the system, please contact the Department of Technology Services, Service Desk at (916) 464-4311 or email your request to: DTSHELP@DTS.CA.GOV

- You can access the DTS ITSM Service Request Management System at: HTTPS://ITSM.DTS.CA.GOV or the Department of Technology Services Homepage at: WWW.DTS.CA.GOV selecting 24/7 Service Desk and "ITSM Service Request Management System". From there you can either sign in to the system or view the application procedures.

- It is recommended that your Internet browser be IE 7 or higher, Mozilla 1.7.3, or Firefox 2.0. Pop-ups should also be allowed for the site.

- To log into this system, enter your Email Address and Password (password is Case sensitive), leave the Authentication field blank, and hit Enter or click on Log in button.



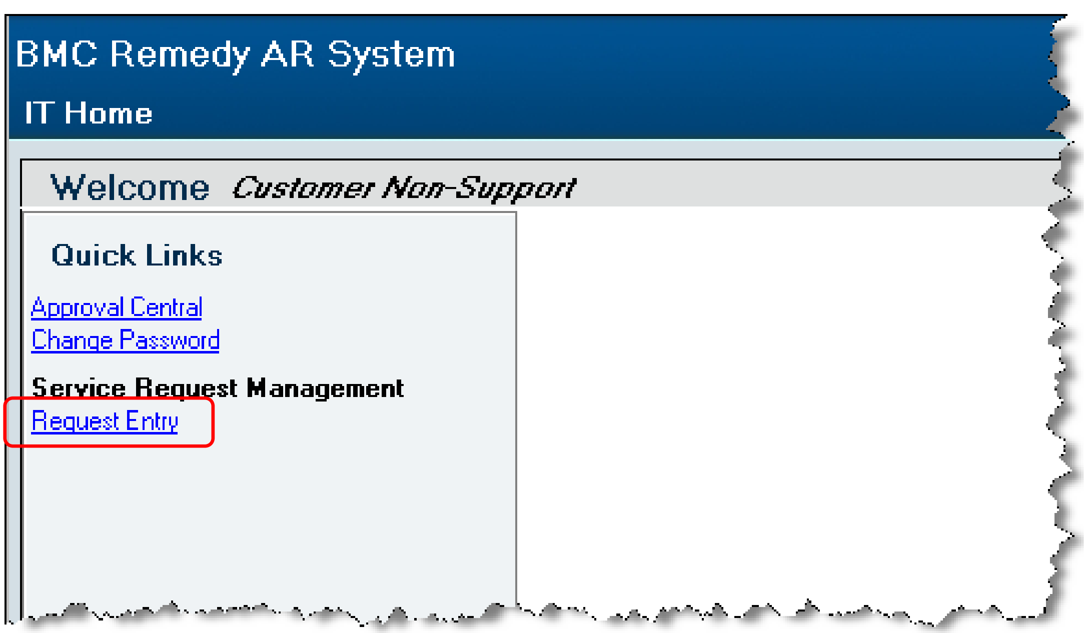
- <u>IT Home Page</u>

After logging in, the IT Home Page will appear. You will have three options to choose from in the Quick Links selection.

- ➢ Approval Central – this link will allow you to approve requests (this option will be available at a later date)

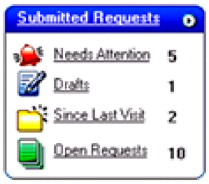
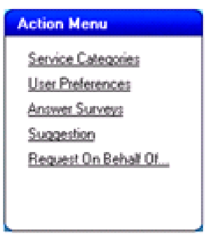
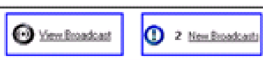
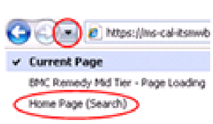
- ➢ Change Password – allows you to change your login password (If you are an **Internal DTS employee**, do not use this link to change your password. Please use your DTS Network password to log in.)

- ➢ Request Entry – launches the Service Categories Console. This console provides a web interface to submit, view, search, update, cancel, re-open, and submit requests on behalf of others. You can also view broadcasts sent by the Department of Technology Services.



Service Categories Console Functions

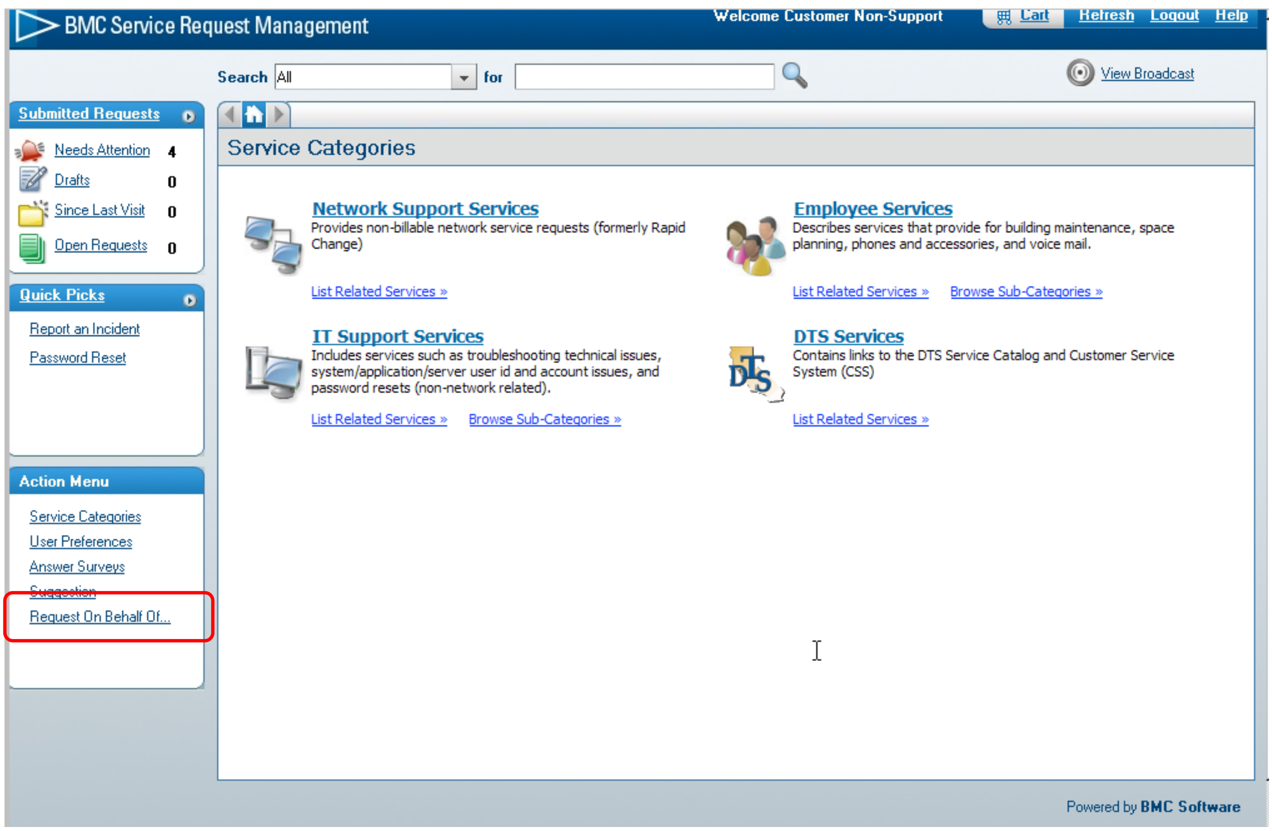
The Service Categories Console functions are located on the left side of the page called the Navigation Pane. The following tables will describe the functional areas.

ICON	FUNCTION	ACTION
	**Submitted Requests**	**Submitted Requests Section**
	Needs Attention	Displays service requests that have been updated or require your attention.
	Drafts	Displays service requests that have been saved as a Draft to be submitted at a later date.
	Since Last Visit	Displays service requests that have been Closed since your last visit.
	Open Request	Displays all Open service requests.
	**Quick Picks**	**Links to Service Requests that are selected most often.**
	Report an Incident	Opens a service request to report an incident.
	Password Reset	Opens a service request for a password reset.
	**Action Menu**	**Allows you to select other important functions.**
	Service Categories	List of all services by category.
	User Preferences	Configure settings of the Request Entry Console.
	Answer Survey	Provide feedback on the quality of service on a particular request.
	Suggestion	Enter suggestions to improve your experience with DTS.
	Request On Behalf Of	Allows you to create requests on behalf of other users.
	View Broadcasts New Broadcasts	Displays important messages about work or outages that might affect your organization.
	Shopping Cart	Allows you to select multiple categories and put them in the shopping cart before filling them out individually.
	Refresh	Refresh the data in the tables.
	Logout	Log out of the Remedy 7 web tool.
	Help	Access the help function on how to use the application.
	Search	The search menu and magnifying glass allows you to search for a specific service.
	Home Service Categories	The Home and Service Categories Links take you back to the Service Categories Console.
	Recent Pages	This will take you back to the IT Home Page or bring up other recent pages. The look will vary depending on which version of IE you are running. Select the drop down arrow next to the back and forward buttons located in the upper left corner of your internet session and select the Home Page (Search).
	Back Link	The Link takes you to the previous view much like the internet browser's back button. The Link maintains the history of the last three views. The Link is disabled when there is no view history, submitting a request, or when you have reached the beginning of the view history.
	Forward Link	The Link moves the user ahead in the Back history. The Link is disabled when you reach the end of the view history.
	Workflow Bar	Displays the status of the selected service request.

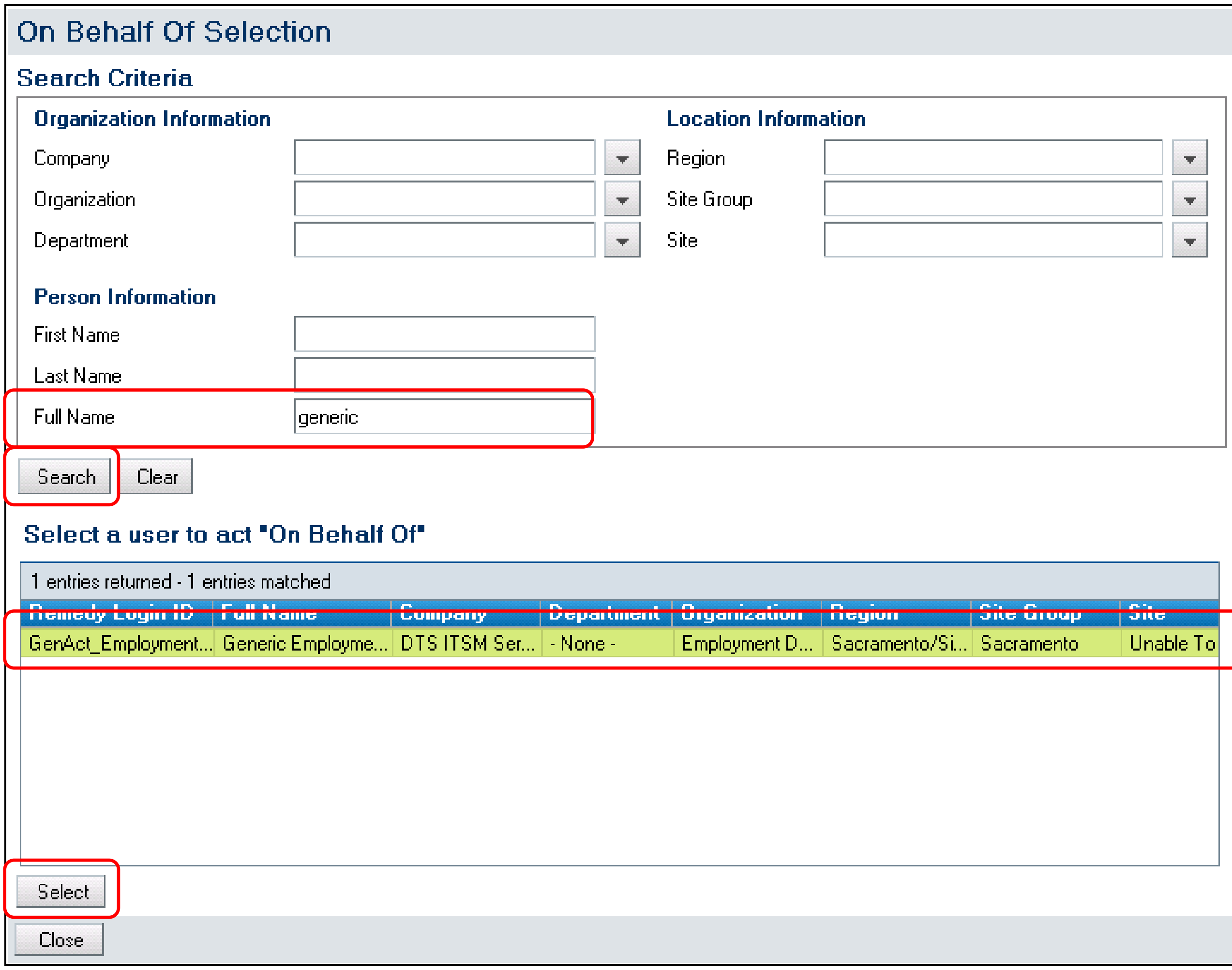
Submitting a request

- After clicking on the Request Entry link on the Home Page, the Service Categories page will appear.

- We recommend that you use the new “Request On Behalf Of” feature located in the Navigation Pane when submitting requests. This feature will allow unrestricted view of all requests within an agency or department.



- The following popup will appear.



- Enter the word “**generic**” in the Full Name field.

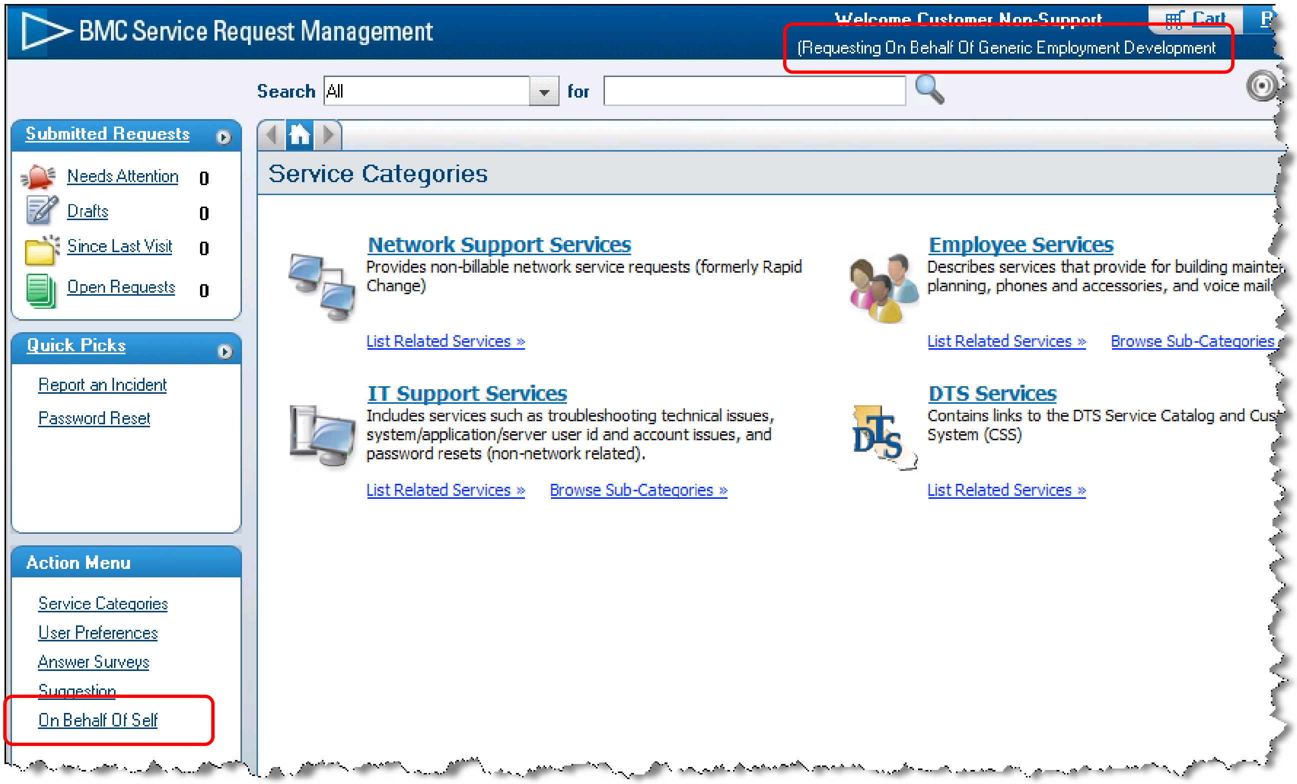
- Click on the Search button.

- Ensure the “GenAct_**(your agency / department name)**“ record is displayed and highlighted in the lower window.

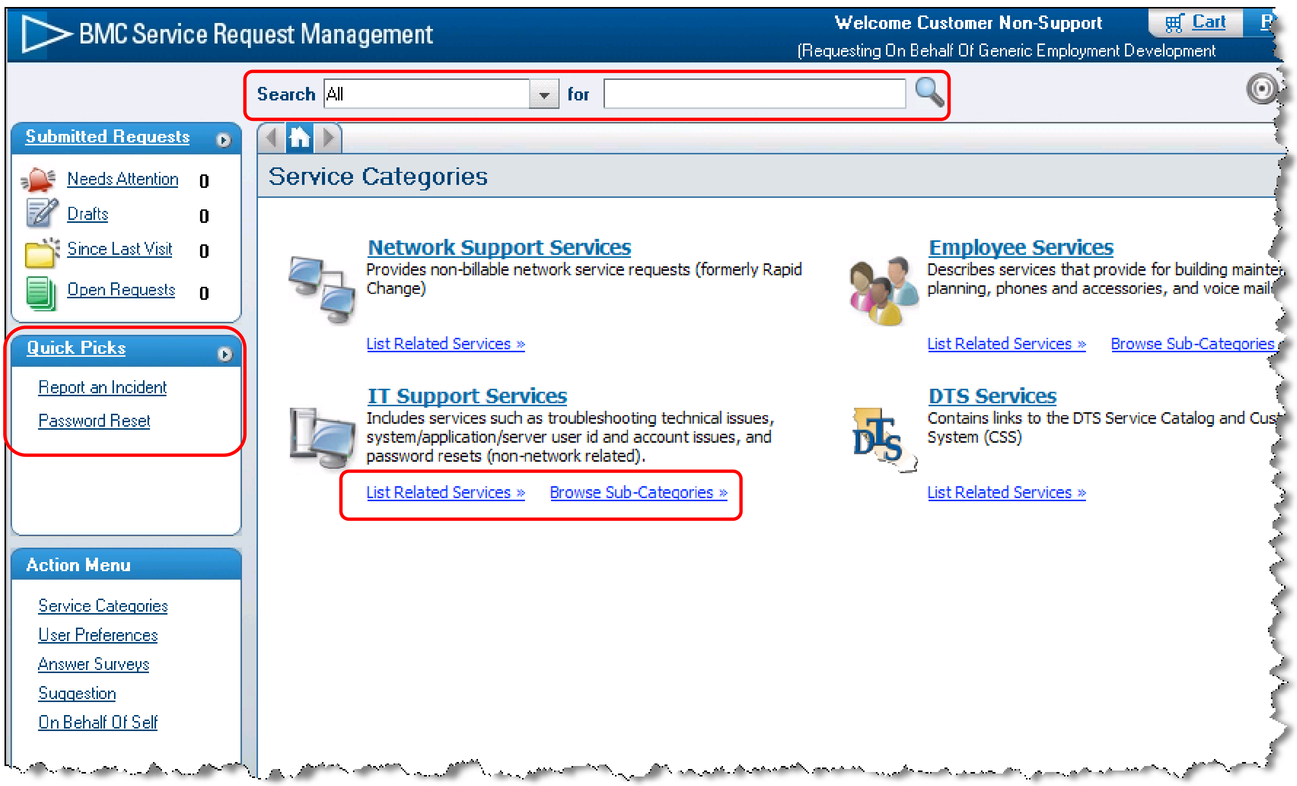
- Click on the Select button to access the generic I.D view.

- This will return you to the Service Categories console.

- The “Request On Behalf Of” will now show as “On Behalf Of Self.” In the upper right corner you will see a “Requesting On Behalf Of Generic” message.

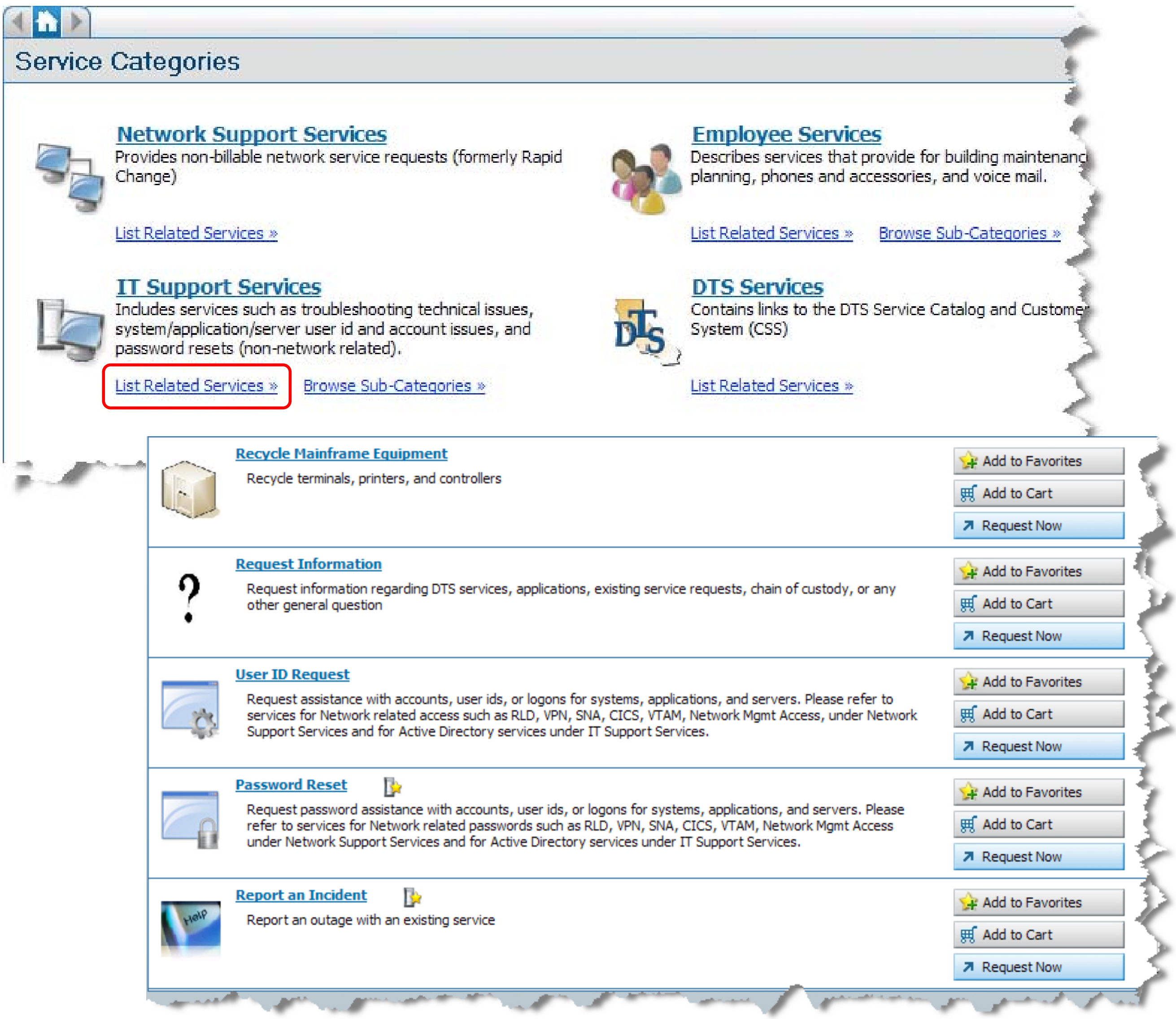


- There are multiple ways to initiate a request.
  - ➢ Service Category links
  - ➢ Searching for a Service
  - ➢ Quick Picks in the Navigation Pane

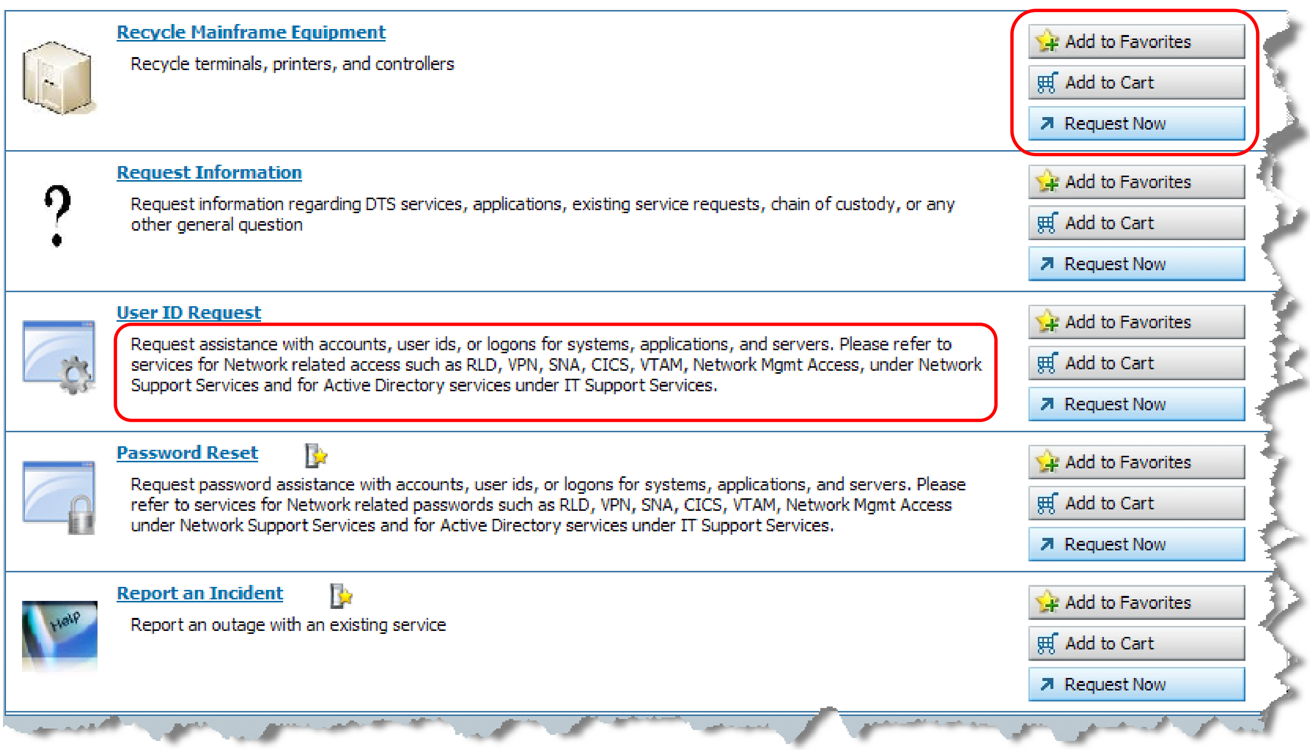


Service Category Links

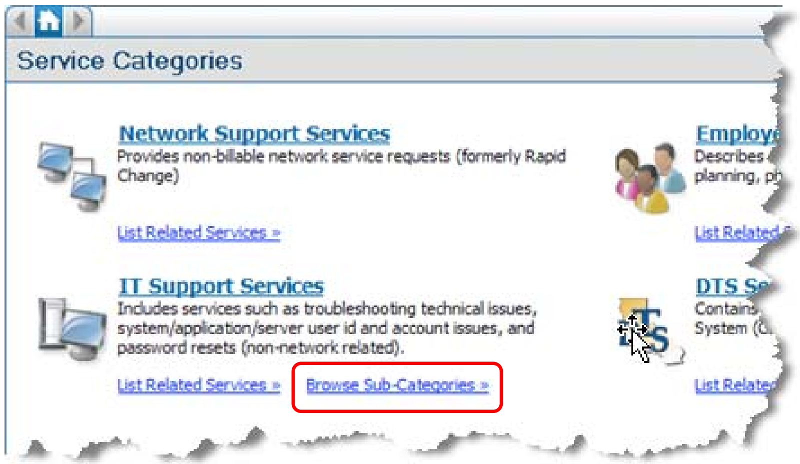
- Clicking on one of the Service Categories link will bring up a list of services under that link.



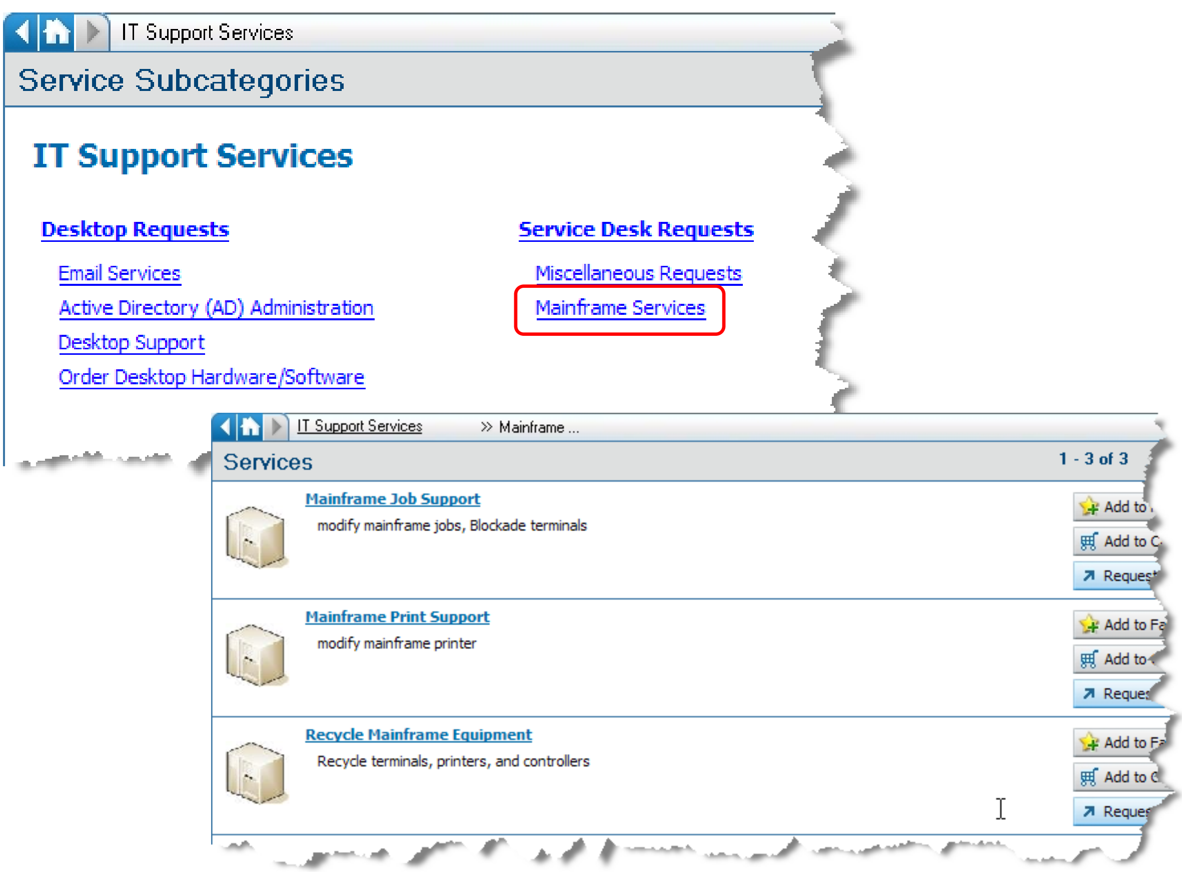
- The Services List will display information about the service and three options to select from.
    - Add a service to your Favorites List that you use most often.
    - Add a service to your Cart so services can be grouped together and submitted all at one time.
    - Request the service now.



- The Browse Sub-Categories link will bring up a list of specific Service Sub-categories to select from.



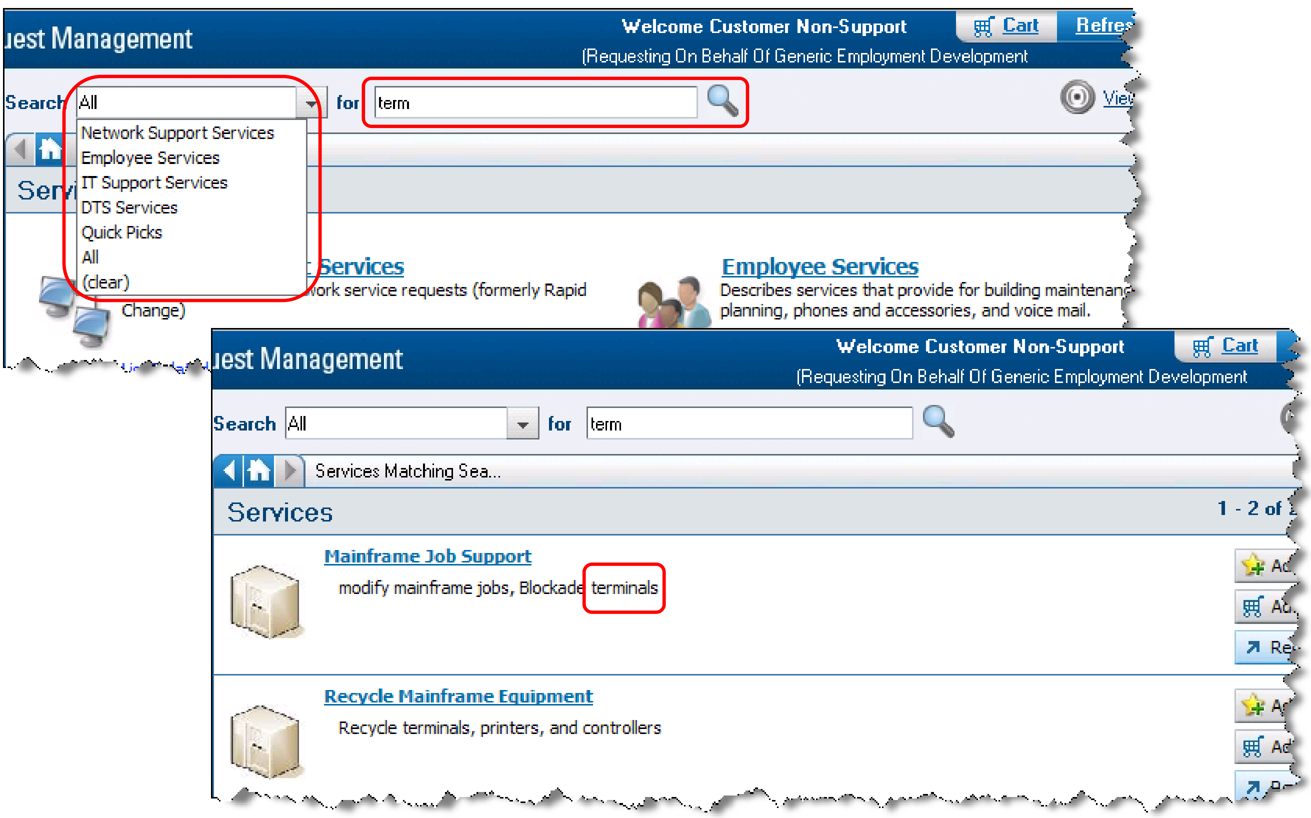
- Selecting a Service Sub-categories link will bring up a specific Services List.



Searching for a Service

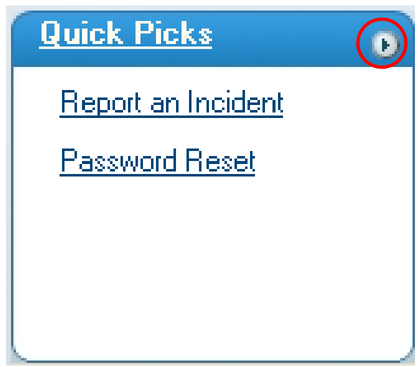
- Search for a service by entering a title, description, using keywords, or a partial word in the search field and clicking on the magnifying glass. A search will be performed for any results that are similar to what was entered. You can also search by a specific category by selecting from the search dropdown.

- An example of this would be entering the word ‘term’ in the search field and clicking on the magnifying glass. A search is performed and similar matches are displayed for you to select from.

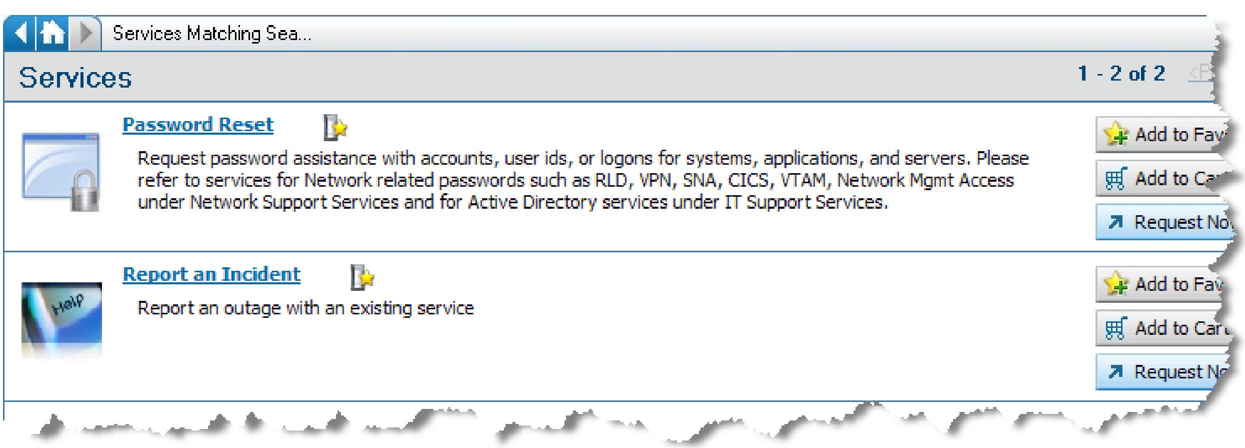


Quick Picks in the Navigation Pane

- Quick Picks are requests that are selected most often and placed in the Navigation Pane eliminating having to search for the specific service. Clicking these links will select a request form that is partially pre-populated with the appropriate fields.



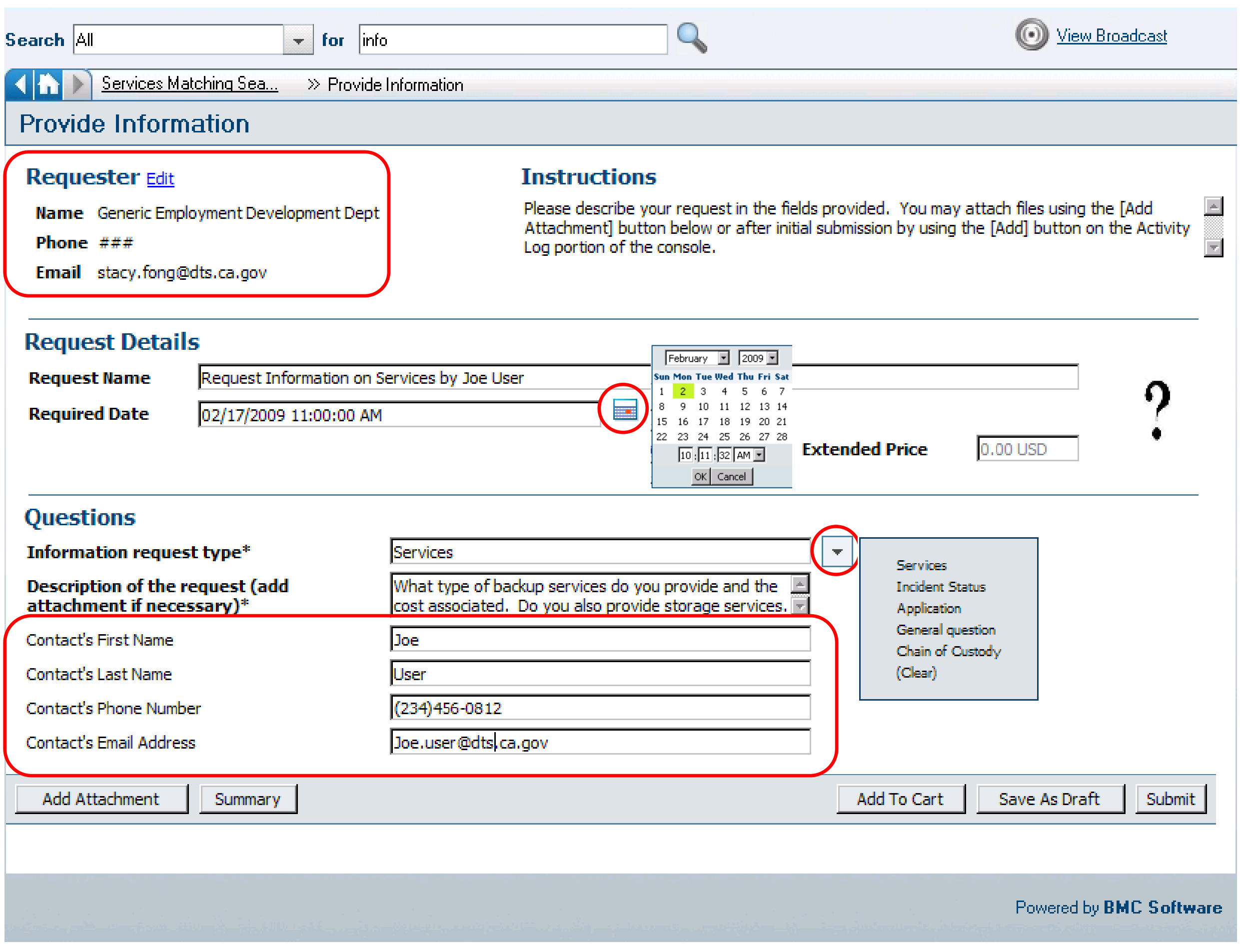
- Clicking on the arrow in the Quick Picks section will display the Services List showing the quick picks with a description of each link.



Populating fields in a Request

- After selecting a Service Category, you will notice that the individual selected for the "Request On Behalf Of" is now the Requester. Depending on which service was selected, various fields will be pre-populated as well as different fields appearing on the form. All fields must be filled out to ensure that your request is addressed in a timely manner.

- Enter the name of the individual needing the request in the Contact's fields.

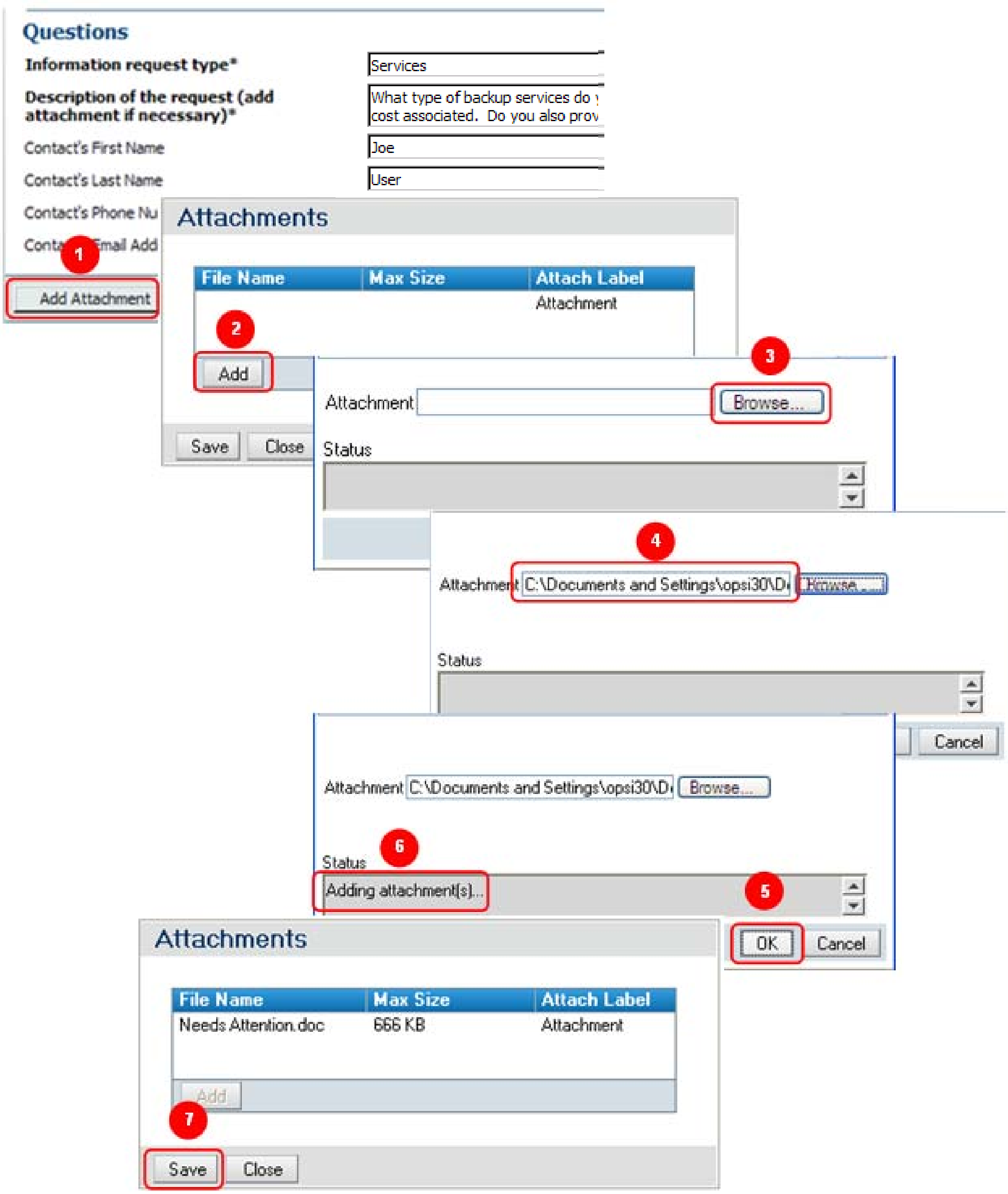


- Some of the fields will have a dropdown arrow to the right of the field. Moving your cursor over these dropdown arrows will display a menu allowing you to select the appropriate item. You are required make a selection from the dropdown menu.

- The Date Required field will have a calendar icon to the right of the field which will allow you to select a date and time.

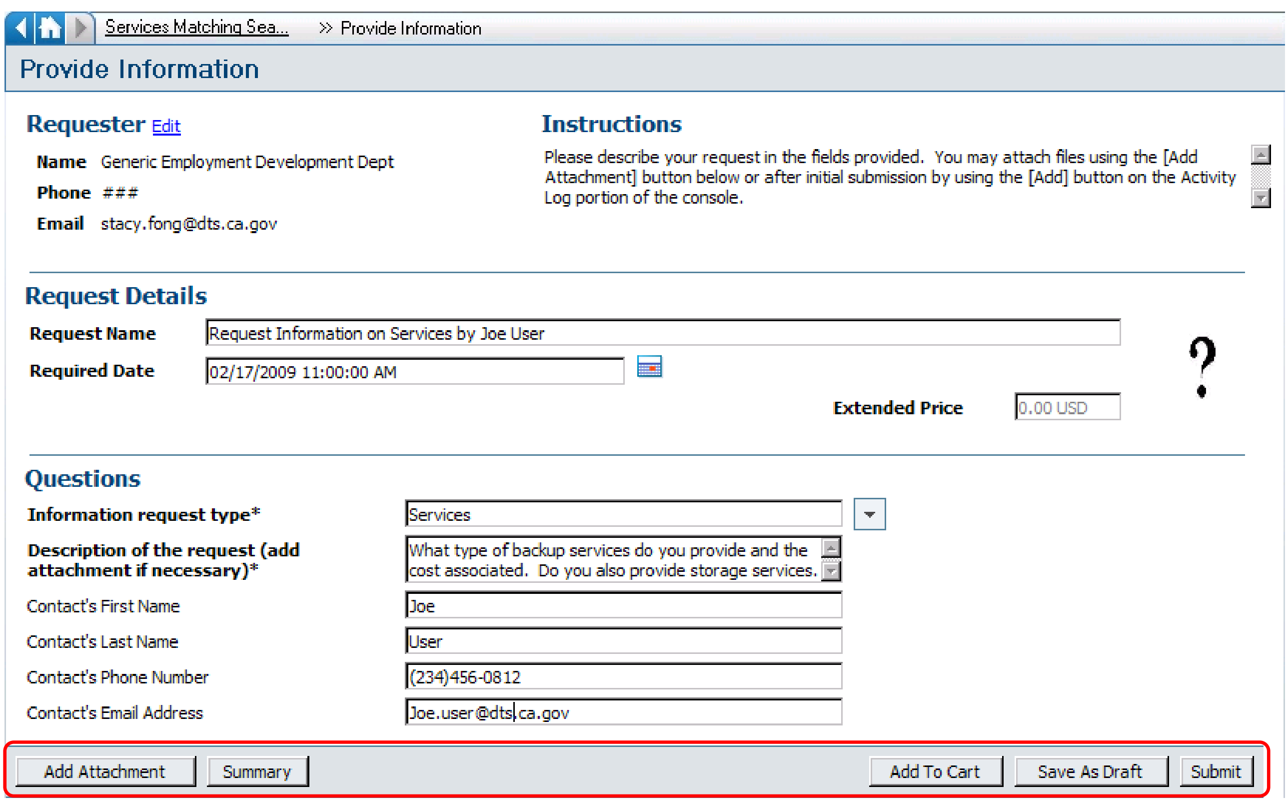
Adding an Attachment

- Add an attachment by clicking on the **Add Attachment** button located at the lower left corner of the form. A popup box will appear, click **Add**, then **Browse**, select the file to add, and then click **OK**. The message Adding attachment(s)… will appear in the status window. When the download is complete, click **Save**.

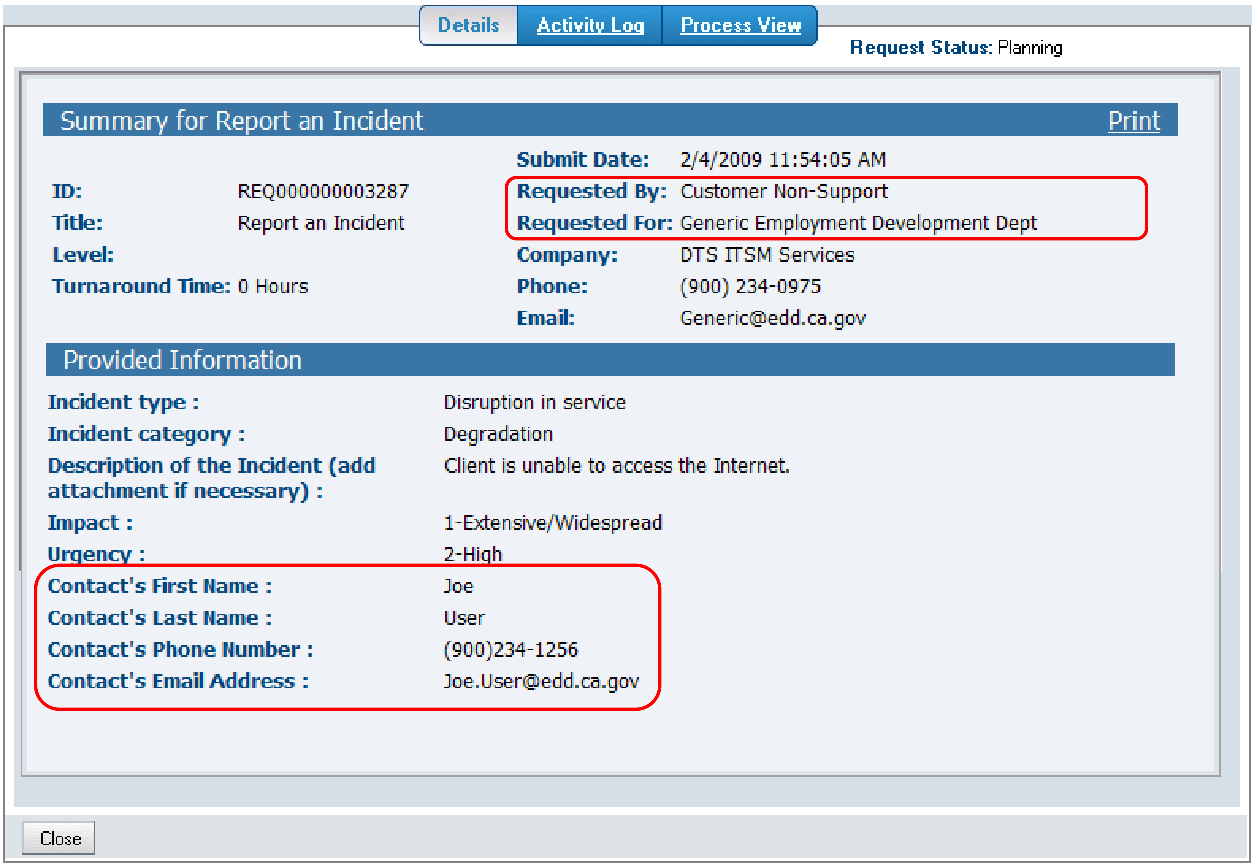


Request Submission

- Located on the bottom of the form are five Request Process buttons.
  - Add Attachment – see previous page.
  - Summary – displays a summary of the request where you can submit the request or save as a draft.
  - Add to Cart – group requests together so you can submit them all at one time. This will also allow you to view all requests or just the requests for that cart.
  - Save as Draft – save the request as a draft to be submitted at a later date.
  - Submit – submits your request.



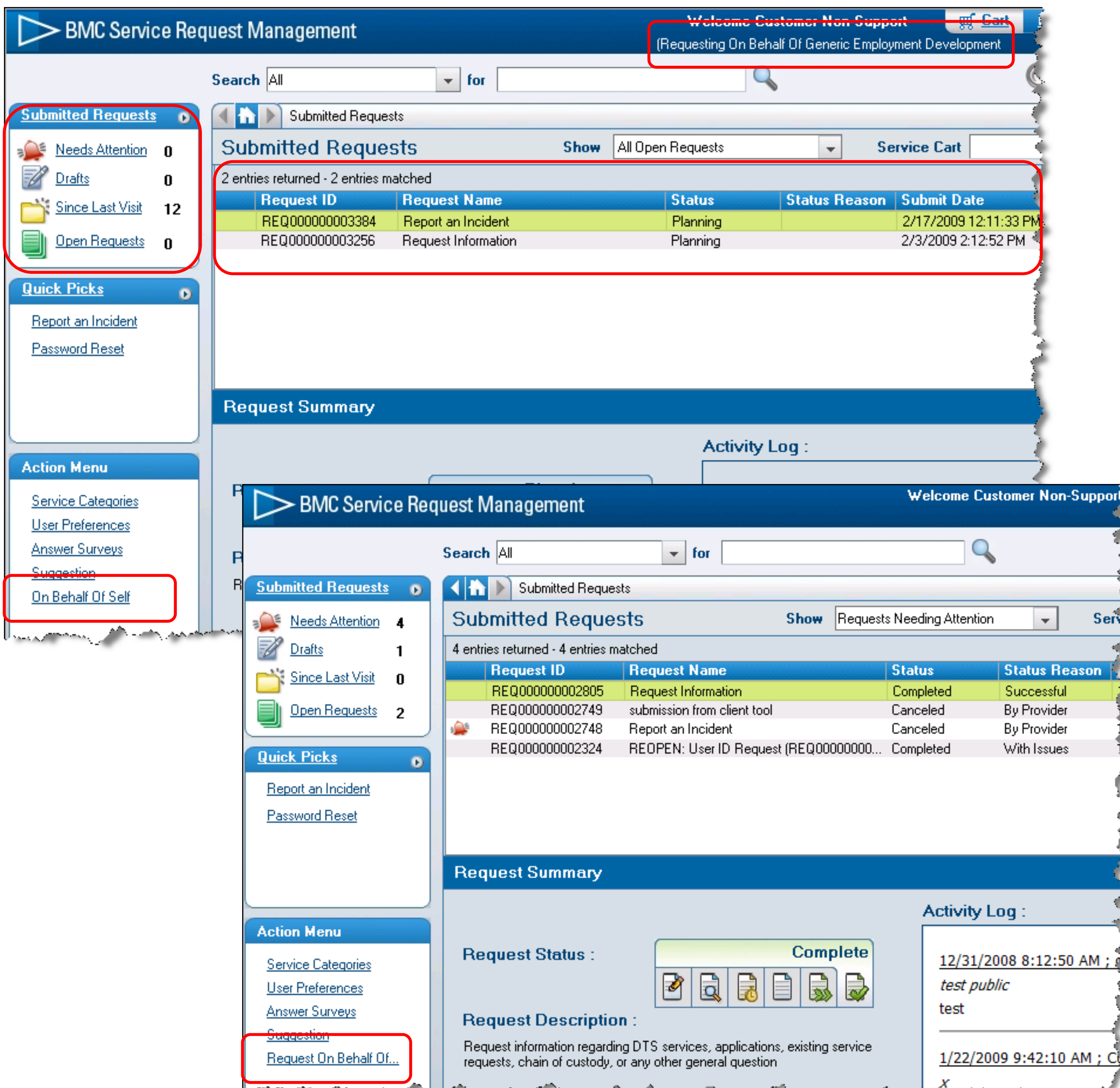
- After submitting the request and selecting Request Details, you will notice that **Requested By** is you, **Requested For** is the Generic profile for your agency, and the **Contact** information is the individual requesting the request.



Viewing a request

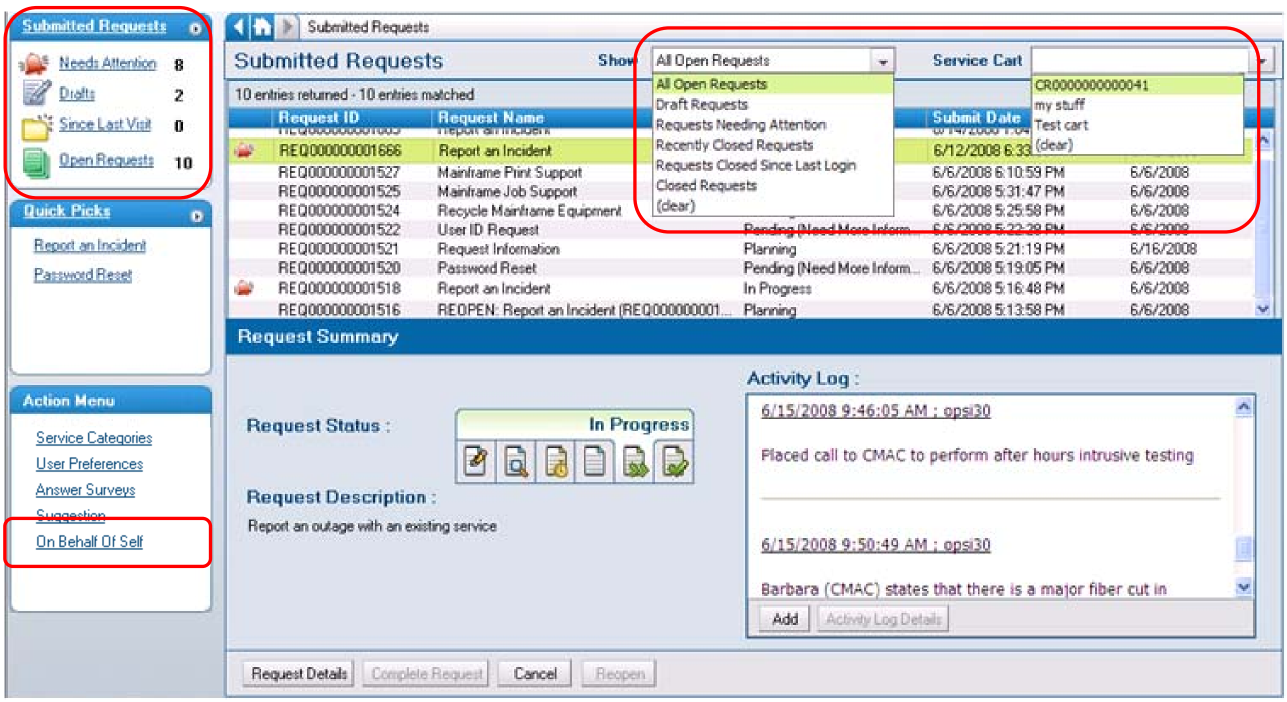
- If you still display the “Request On Behalf Of” message at the upper right corner of the form, you are viewing all requests in your agency or department. You can locate your requests from the selections in the table.

- If you want to only see your requests, click the “On Behalf Of Self” link. It will now display “Requests On Behalf Of” and you are viewing your own requests.



- If you are already in the Submitted Requests console, you can also view the requests through the Submitted Requests Navigation Pane or by clicking on the Show field or Service Cart located at the top of the table. These dropdowns will have other additional tables you can access that the navigation pane does not.

- You will also have the same option on this console to select viewing all of your agencies requests or just your own as described in the previous page.



Service Request - Navigation Pane

- There are four selections to choose from:
  - Needs Attention – displays requests that require your attention.
  - Drafts – displays requests that have been saved as a Draft to be submitted at a later date.
  - Since Last Visit – displays requests that have been Closed since your last visit.
  - Open Request – displays all Open requests.

Service Requests – Show Field

- Settings in this dropdown are configurable through the User Preferences link.
- There are six selections to choose from:
  - All Open Requests – displays All Open requests.
  - Draft Requests – displays requests that have been saved as a Draft to be submitted at a later date.
  - Requests Needing Attention – displays requests that require your attention.
  - Recently Closed Requests – shows Recently Closed request.
  - Requests Closed Since Last Login – displays requests that have been Closed since your last visit.
  - Closed Requests – shows all of your Closed requests.

Service Cart

- Selections in this dropdown are grouped together if you submitted your requests using the Service Cart. Only requests that are in the particular cart are displayed when selected. You can enter a unique name for the cart to make it easily identifiable from other carts and requests.

Submitted Requests Console

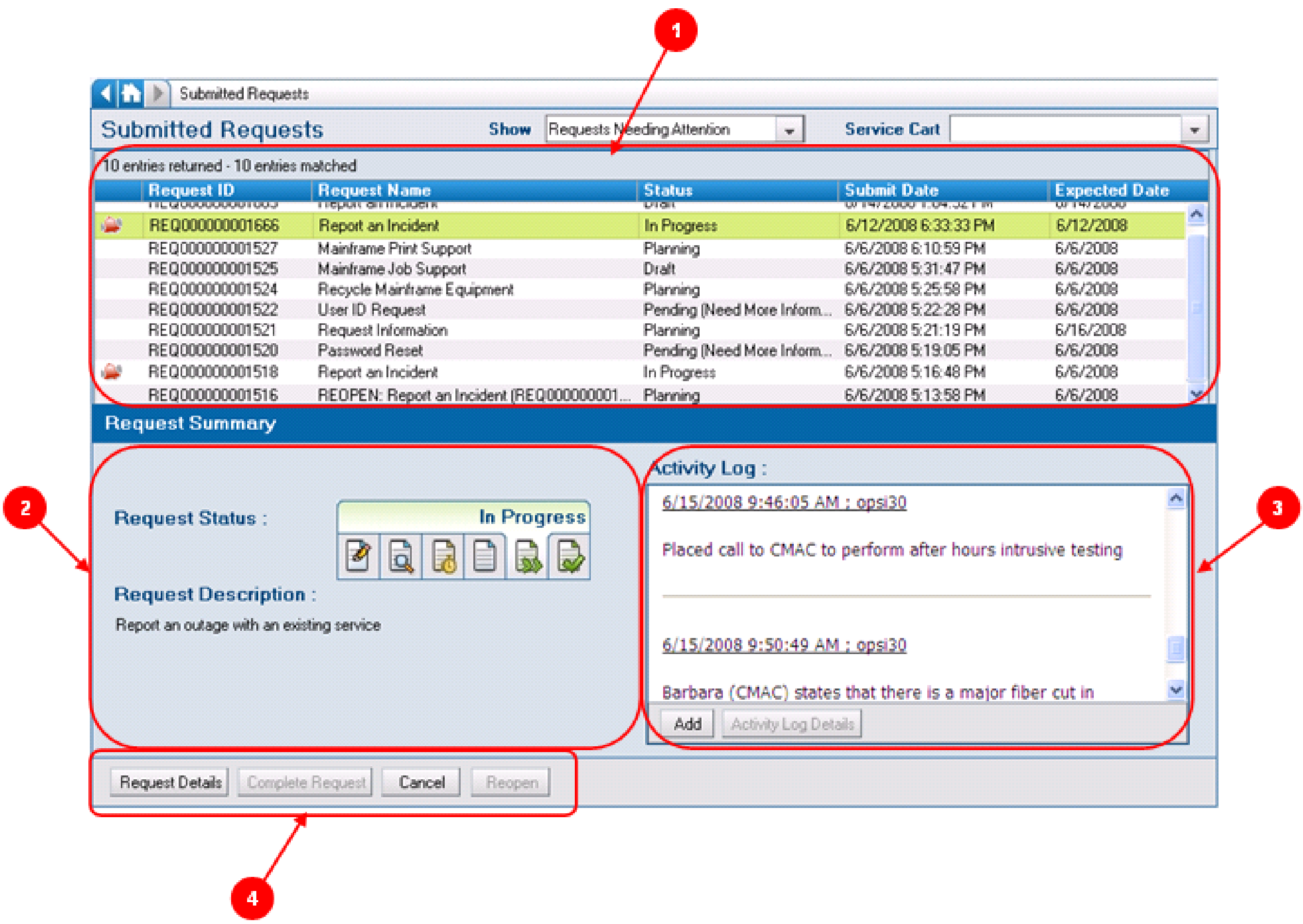
- There are four sections to a Submitted Request Console.

  1). Request Table

  2). Request Status and Description

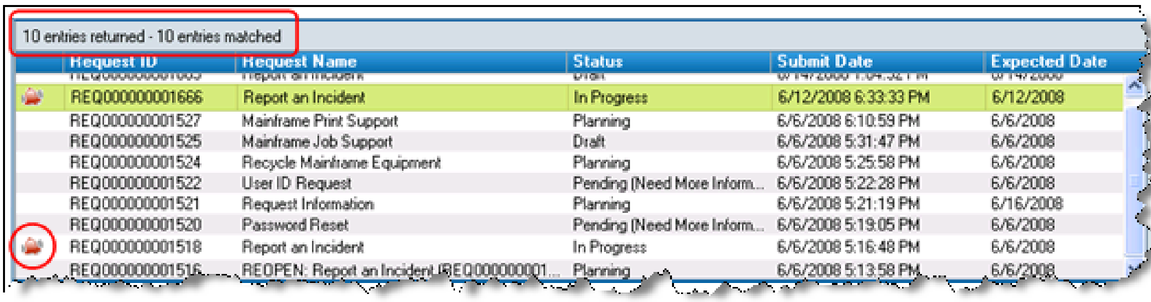
  3). Activity Log

  4). Request Process Buttons

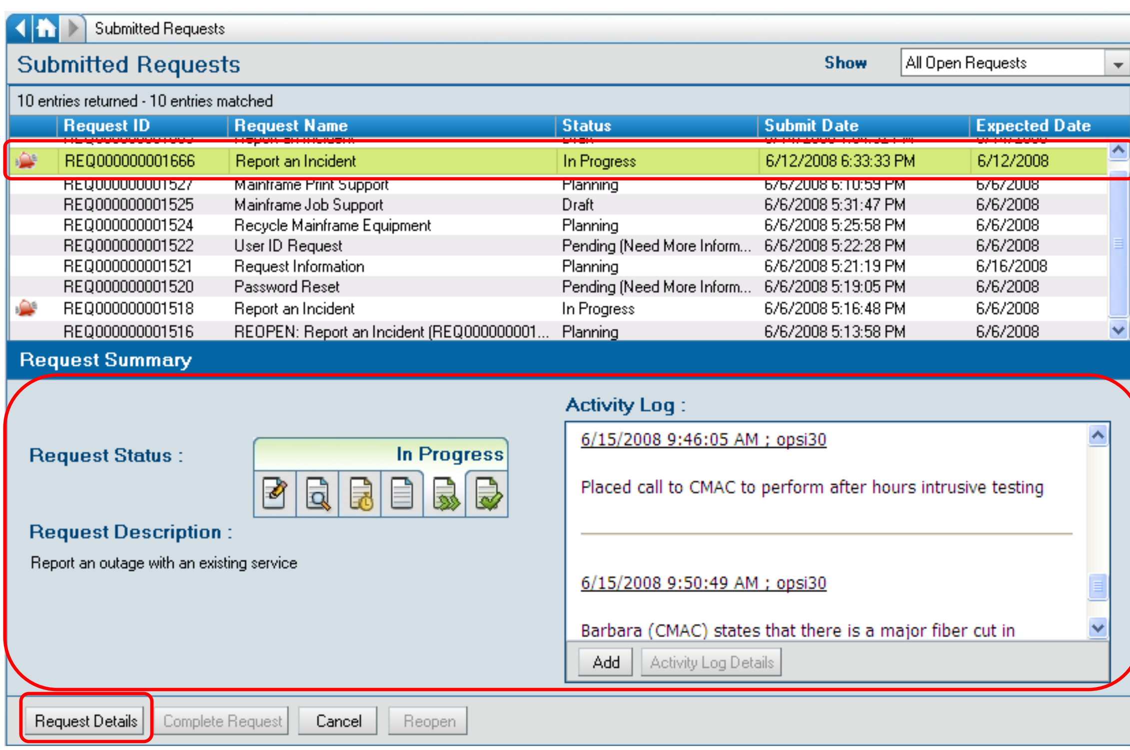


<u>Request Table</u>

- This table will display a list of requests depending on the search criteria you select from the Service Requests Navigation Pane, Show field, or Service Cart. The table will display the Request ID, Request Name, Status, Status Reason, Submit Date, and Expected Date. The table will also display how many requests were found and an alarm symbol if you have requests that need your attention.



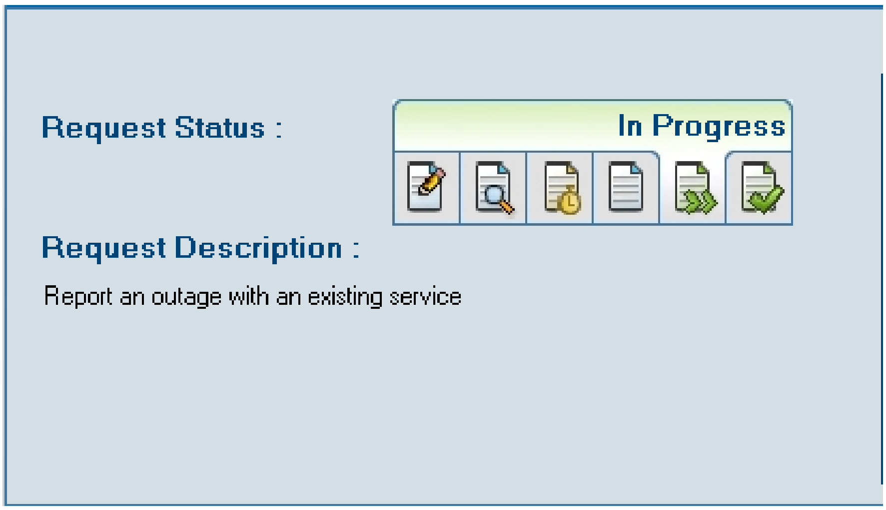
- There are multiple ways of viewing a request. You can highlight any request in the table. This will populate information about the request in the Request Summary area located below the table.



- You can also highlight a request and click on the Request Details button or Double click on the request and this will bring up the Request Details view.

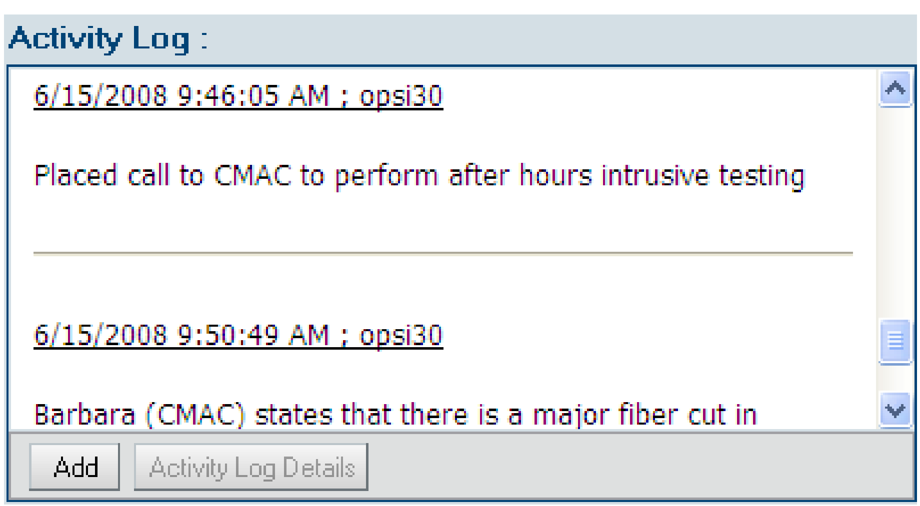
Request Table - Request Status and Description

- This will display the current status and description of the selected request.



Request Table - Activity Log

- The Activity Log displays entries make by yourself and by DTS Staff. It will show the date and time stamp, the DTS technician that made the entry, and information on what was done.

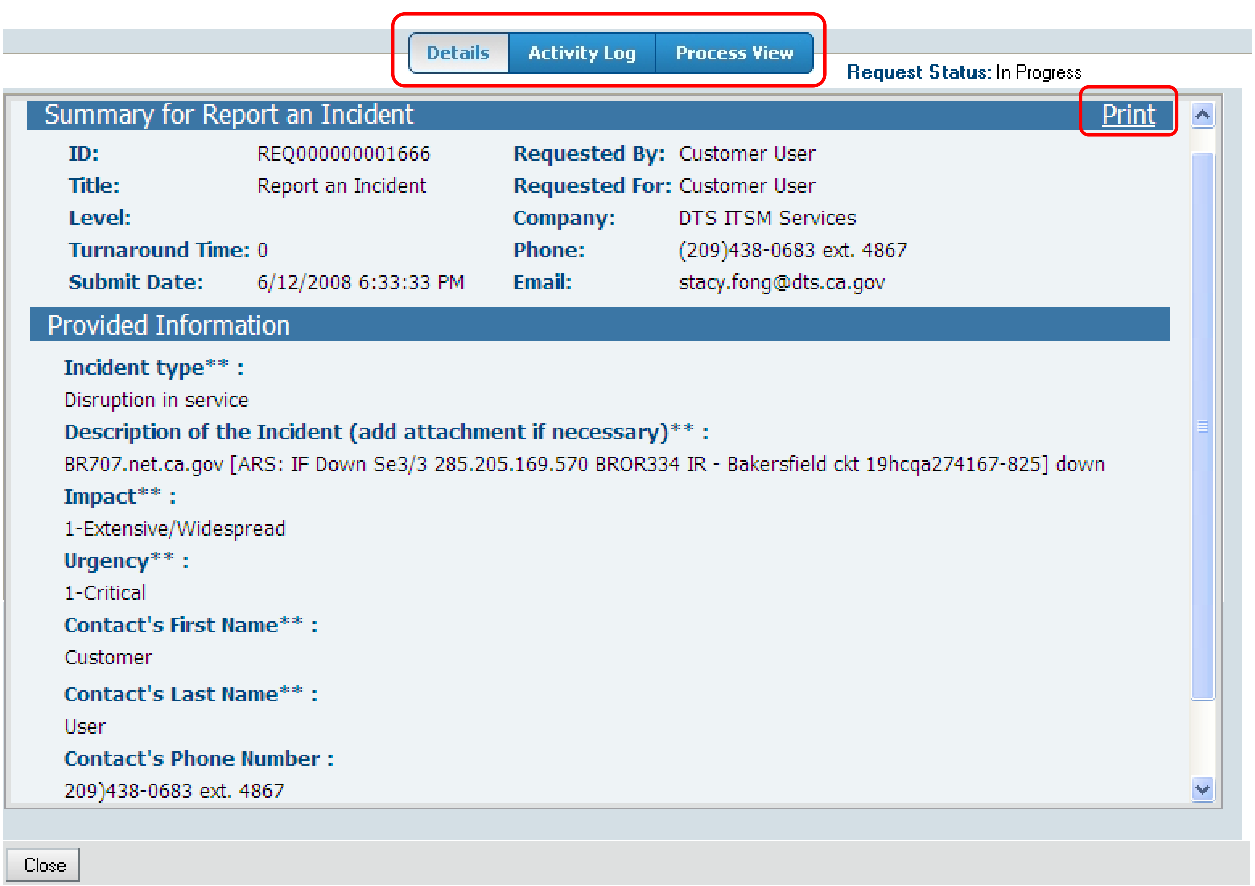


Request Process Buttons

- These buttons will perform certain functions and will either be enabled (visible) or disabled (grayed out) depending on the table you are viewing or status of the Service Request.

Request Details – Details Tab

- Selecting this view will display the Details of the request, the Activity Log showing entries made by DTS staff, and the Process View which contains system information. You can print out the request by selecting the Print link. Only information in the Details tab will be printed, the Activity Log will not be included. You can select the other views by clicking on the tabs located at the top of the form.



Request Details – Activity Log

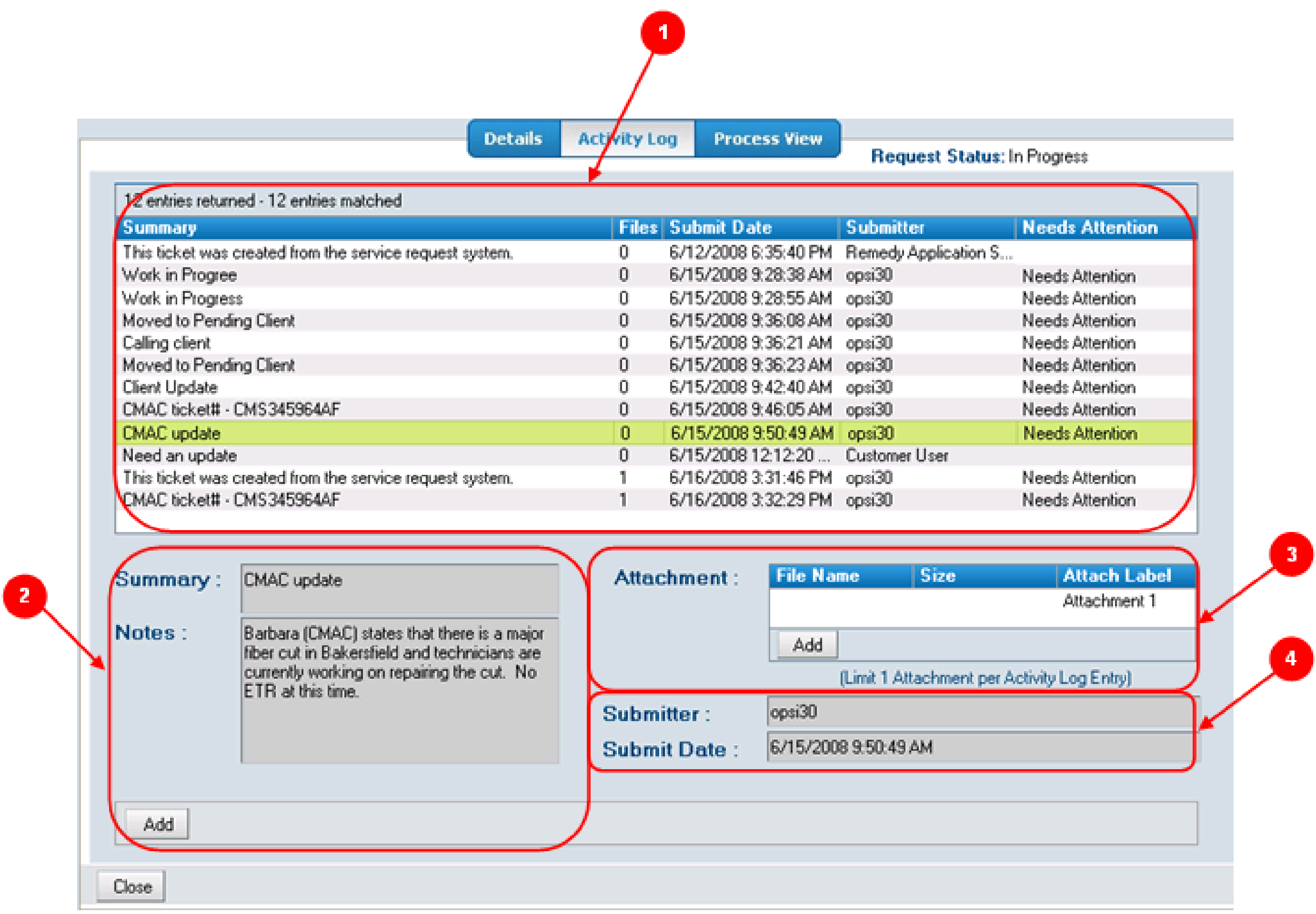
- The Activity Log is broken up into four sections.

    1). Summary Table

    2). Summary Description

    3). Attachment

    4). Submitter Information



Request Details – Activity Log – Summary Table

- The Summary table displays the Summary, Attached Files, Submit Date, Submitter, and Needs Attention columns. If the entry displays a Needs Attention message, this is a flag informing you that a new entry has been entered into the Activity Log by DTS staff. Once you view or take action on that entry, the alarm symbol and Needs Attention message will disappear.

12 entries returned - 12 entries matched

Summary	Files	Submit Date	Submitter	Needs Attention
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remedy Application S...	
Work in Progree	0	6/15/2008 9:28:38 AM	opsi30	Needs Attention
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30	Needs Attention
Calling client	0	6/15/2008 9:36:21 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30	Needs Attention
Client Update	0	6/15/2008 9:42:40 AM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30	Needs Attention
CMAC update	0	6/15/2008 9:50:49 AM	opsi30	Needs Attention
Need an update	0	6/15/2008 12:12:20 ...	Customer User	
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30	Needs Attention

Request Details – Activity Log – Summary Description

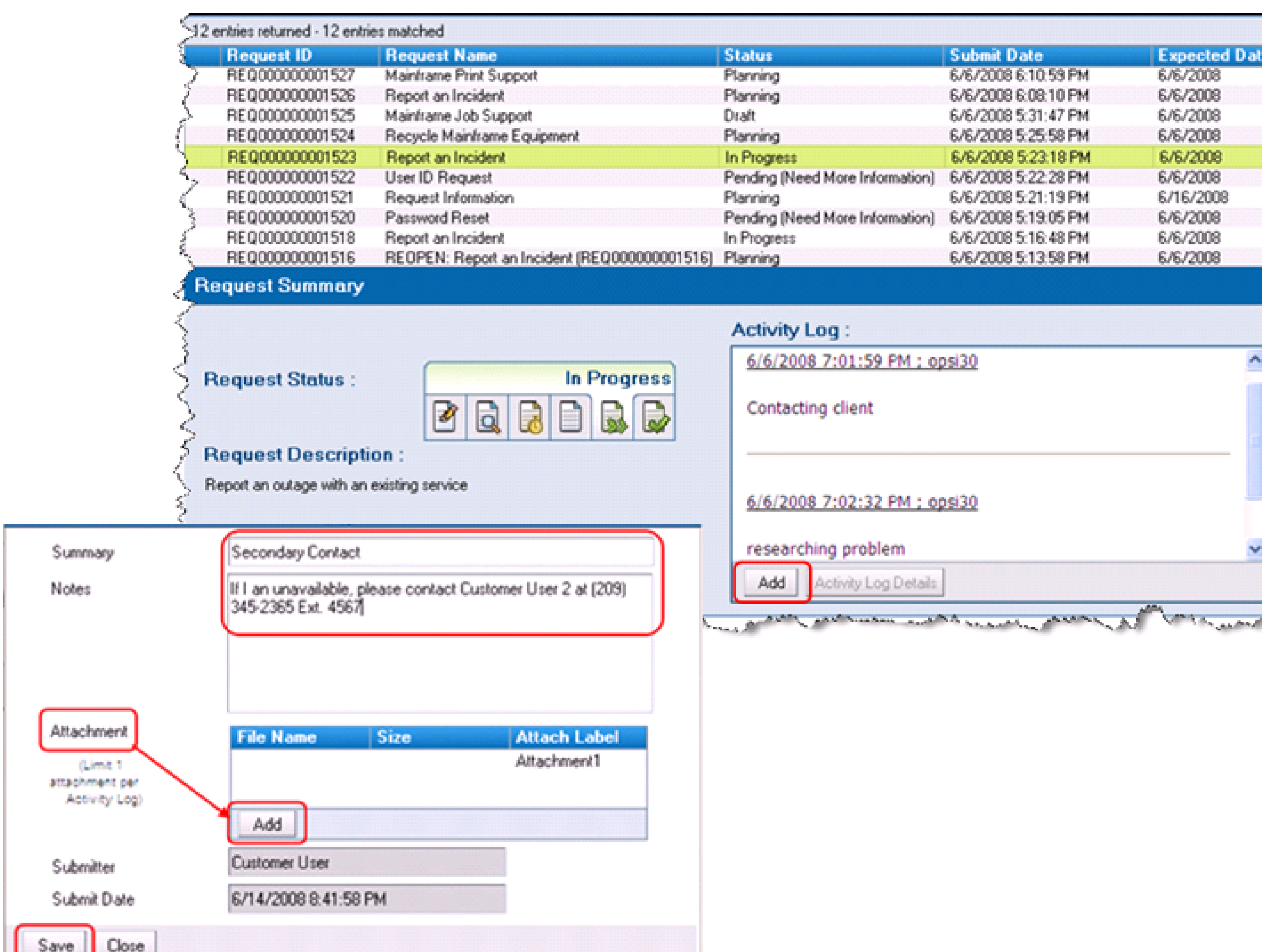
- Clicking on an entry in the Summary Table will display the Summary and any Notes entered for that entry, Attachments, and the Submitter and Submit Date information.

Updating a request

- There are two ways to update a request.
  - ➢ The Submitted Requests Console Activity Log. Highlight the request to be updated.
  - ➢ The Request Details Console Activity Log Tab. Highlight the request to be updated and double click or click on the Request Details button.

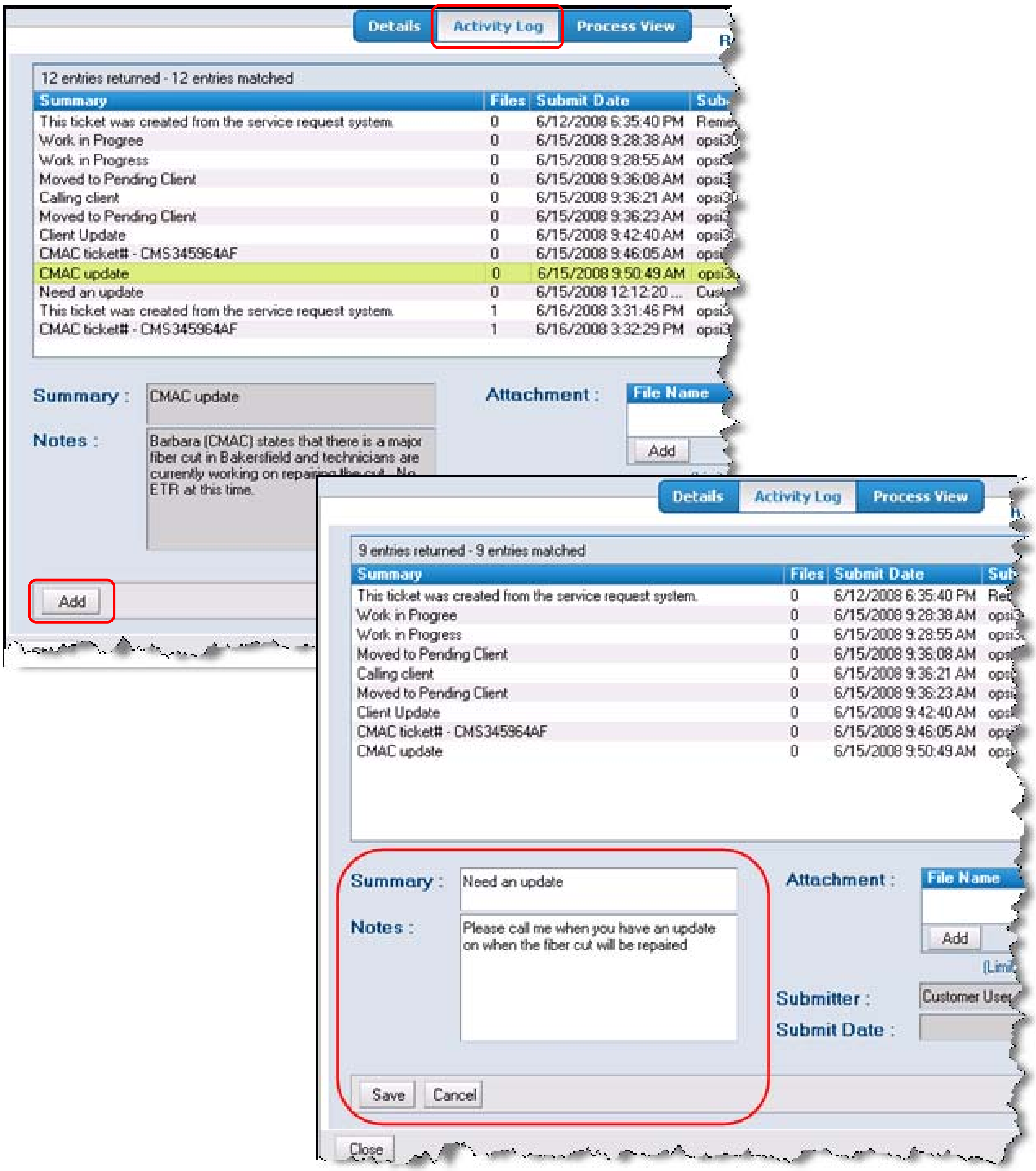
Submitted Requests Console – Activity Log

- To make an entry in the Activity Log, click the Add Button from the Submitted Request Console, make an entry in the Summary and Notes fields, and click Save. If you need to add an attachment, follow the previous instructions on Adding an Attachment.

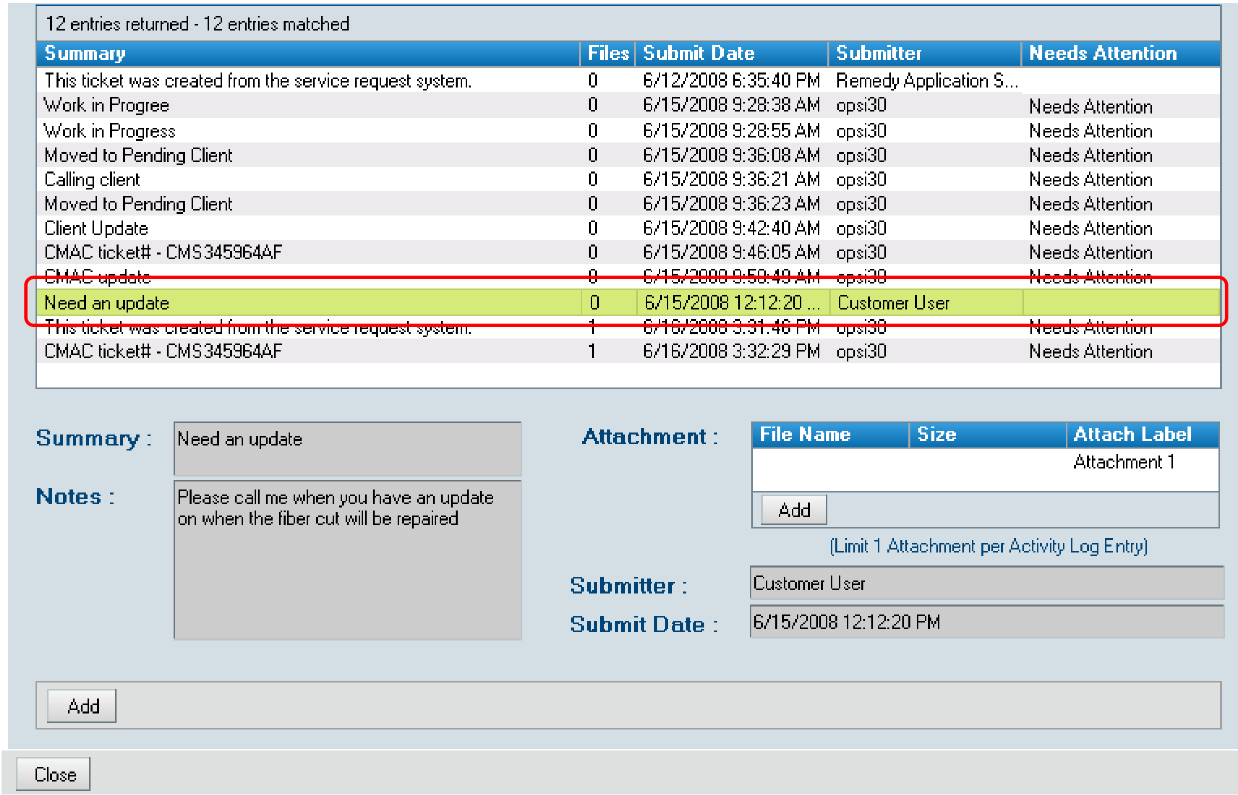


Request Details Console – Activity Log Tab

- Clicking on the Add button in the Activity Log from within the Request Details console will also allow you to make an entry in the Activity Log and add an Attachment. The Summary and Notes fields will be blank allowing you to make an entry. Click Save.



- After the entry is saved, you will see your entry in the table with your name shown as the submitter.



12 entries returned - 12 entries matched

Summary	Files	Submit Date	Submitter	Needs Attention
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remedy Application S...	
Work in Progree	0	6/15/2008 9:28:38 AM	opsi30	Needs Attention
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30	Needs Attention
Calling client	0	6/15/2008 9:36:21 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30	Needs Attention
Client Update	0	6/15/2008 9:42:40 AM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30	Needs Attention
CMAC update	0	6/15/2008 9:50:49 AM	opsi30	Needs Attention
Need an update	0	6/15/2008 12:12:20 ...	Customer User	
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30	Needs Attention

Summary : Need an update

Notes : Please call me when you have an update on when the fiber cut will be repaired

Attachment :

File Name	Size	Attach Label
		Attachment 1

Add

(Limit 1 Attachment per Activity Log Entry)

Submitter : Customer User

Submit Date : 6/15/2008 12:12:20 PM

Add

Close

Logging Off

- Click the Logout link at the upper right corner of the screen to close the application. Do not click on the "**X**" in the upper right corner, doing so will cause a delay in your next login for a minimum of one hour.